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RB
RESTAURANT BUSINESS

Making The Grade

FOODSERVICE EDUCATION COMES OF AGE 101

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SPECIAL REPORT NAFEM PREVIEW. *RB* will provide a detailed roundup of the National Association of Food Equipment Manufacturers' exhibition of new equipment and technology, with booth listings and show schedule.

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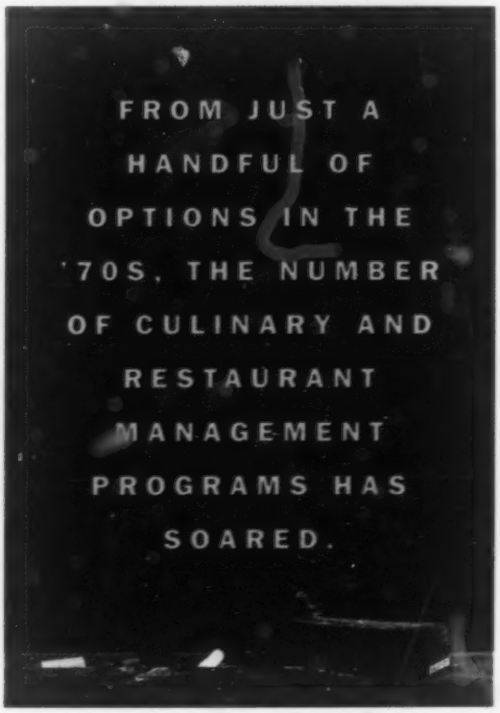
RB
RESTAURANT BUSINESS

COVER STORY

The phenomenal growth of culinary and hospitality schools in this country in the last 20 years prompted *RB* to do its homework and produce an in-depth evaluation of the state of foodservice education. As the industry has matured, so has its approach to training and academic programs for its future foodservice operators, managers, and chefs. Schools have become more diverse: Hospitality programs now offer more food and beverage courses; culinary schools have added more management courses. Current issues included in this educational report card are: the need for professionalism, the shortage of teachers, and the fight for accreditation.

Foodservice Education Comes of Age

Like the industry it feeds, hospitality education has become a booming business. Over the past two decades, the number of professional culinary arts and hotel and restaurant management (HRM) programs has soared. From just a handful in the 1970s, the field has expanded to include literally hundreds of options.



According to the American Culinary Federation (ACF), there are now about 525 post-secondary community colleges and vocational-technical schools (vo-techs) in the United States that offer training in the culinary arts. And according to the Council on Hotel, Restaurant, and Institutional Education (CHRIE), there are about 170 four-year HRM programs (compared with just 40 in the 1970s), and more than 700 offering associate's degrees, certificates, or diplomas.

LABOR SHORTFALL. Yet despite this tremendous growth—and in spite of today's recessionary economy, with its attendant drop in new jobs—it is not enough for an industry facing a severe labor shortage. "The educational system today is woefully inadequate in terms of meeting the needs of the industry," says Mike Hurst, owner of 15th Street Fisheries in Fort Lauderdale, FL, and 1990 president of the National Restaurant Association (NRA). "Current capacity is not even beginning to address the industry's labor shortage, and we'll be falling even further behind in the future."

There are now some 50,000 students matriculated in two- and four-year HRM programs nationwide (with two-year students outnumbering four-year students by a factor of three to one), graduating at the rate of 20,000 to 25,000 per year, according to the NRA. But over the next five years, the NRA projects that the industry will need more than 400,000 new managers, suggesting a shortfall of serious proportions.

"We've got to build up the pipeline," says Ellen Moore, director of certification and instructional services for the Educational Foundation of the NRA, which has taken a variety of counteractive steps (see accompanying sidebars). "Although the recession has forced cutbacks in a number of recruiting programs, we're still looking at a situation of having many more jobs than students through the rest of the decade."

Is a degree really that important in today's job marketplace? It certainly helps, particularly in the area of operations management. "Because of the increasing complexity of hotel and restaurant operations, a degree is becoming more of a necessity," says Keith Kefgen, a vice president with the New York City-based executive-recruiting firm Marshall-Alan Associates, and himself a graduate of Cornell's hotel-management program, Ithaca, NY. "Many culinary people still are self-taught, but in the area of hospitality management, a degree gives you a stronger foundation and a better chance of being hired."

Many larger companies recruit anywhere from 30% to 90% of their management trainees from the hospitality schools. "The hospitality programs are a primary source for our management trainees," says Keith K. Morrow, senior vice president, human resources, for Dallas-based Wyatt Cafeterias; 80% of Wyatt's hirees come from the schools. "These graduates have the skills, the proven interest, and the attitude we're looking for."

Christian De Vos, vice president for the fine-dining division of Philadelphia-based ARA Services, feels that, generally speaking, hirees who have come up through the schools have better work habits than those who have come up through the field. "People from the culinary schools and management programs have discipline and more depth of training."

Still, there's no substitute for experience in this most practical of industries. "We stopped recruiting from the schools a few years ago because the salary expectations of graduates had climbed way out of line, especially relative to the experience level we could 'buy' for the same amount of money," says Mark Carneal, vice president, human resources for Irvine, CA-based El Torito Restaurants. "We found that graduates were long on theory and short on practical experience. Now, we'd rather let another company take them out of college and give them that initial industry experience. Then, when they become

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RECRUITMENT STRATEGIES

Most companies still look to the schools as a primary source of new supervisory personnel. Recruitment strategies for graduates, however, tend to be different from those targeted at competitors' employees. Here are some specifics:

■ Tailor training programs that address the special needs of recent graduates. "One of the reasons we stopped recruiting from the schools is because we really didn't have the right training approach in place," says Mark Carneal, vice president, human resources, for El Torito. "You need to develop training methods that address the shortfalls they have in hands-on experience. Someone with previous experience can go through the basic training in eight to 12 weeks; the recent graduate may need 16 to 20 weeks. A buddy system is also a valuable tool, pairing new recruits with established managers who can help the rookies get over that 12- to 18-month initial hump." (Carneal would like to resume recruiting from the schools on a selective basis when El Torito designs a new training program.)

■ Keep in touch with the schools. Rather than descending once a year for career days, human resources executives suggest building ongoing relationships with schools and their administrators and students. R. Wray Jones, vice president, director of food services for Neiman Marcus, makes regular trips to the schools to speak about the industry and the particular benefits of working for his company.

■ Consolidate geographically in order to reduce costs per hire and make recruiting as efficient as possible. "We don't go to as many schools as we used to, but we get more acceptances because we're concentrating on schools in markets where the students are more likely to know us," says Keith K. Morrow, senior vice president, human resources for Wyatt Cafeterias. Morrow also lectures extensively at the schools, along with six of his Wyatt colleagues, and has an on-staff college relations manager.

■ Support the schools. Money spent helping the schools is returned in kind in exposure and good will for the company. Many companies endow student scholarships, make donations that enable educators to travel to industry events, contribute money to the program's general fund for items like facilities improvements and books, or make direct gifts of equipment, supplies, or other resources. ARA has contributed to a number of programs to benefit minorities, and is involved in a joint venture with Marriott to provide internships for faculty members of a number of schools. "All of these things help us build a better relationship with the schools, and help us build our image as a preferred employee," says Joel Katz, ARA's director of human resources development.

■ Be specific about presenting the company to students. Wyndham Hotels sends operations people—the hotel general managers—not human resources staff, to interview at the schools, says Mary Watson, regional vice president for the company's Garden Hotels division. "Students hear the real thing from the people who are on the line. We are also very up front about what the hotel business is like: the hours required, the level of commitment and hard work that's necessary."

■ Enlist help from other students. Like a number of companies, Hilton has paid on-campus student liaisons at its major target schools, who come for a one-day training program at the company's Beverly Hills, CA, headquarters and then return to the school to become a satellite resource center for Hilton. "These student liaisons work with deans, faculty members, and students to make everybody more aware of the company," says Susan Bastianello-Salazar, director of recruitment. "They're a great tool, and they often end up working for Hilton themselves upon graduation. It's important to give all the support they need."

■ Be strictly ethical in recruiting procedures. "Some companies are doing all the wrong things on the campuses," says Rudy La Kosh, director of employment for Stouffer Hotels and Resorts. "They're using inappropriate criteria for the interviewing procedure, interviewing when they may not actually be offering any jobs. With so much competition for the best graduates, a company just can't afford to do this."

A representative from Sheraton Corp. talks to a hospitality student at a career fair.

More than 700 students registered for Boston University's Network 91, a hospitality career fair.

PHOTOGRAPHS BY BOSTON UNIVERSITY PHOTO SERVICES

disillusioned with their first job—and 60% to 80% of them will—we hire them. It saves us time and money."

STUDENT MATURITY. Many students in culinary and HRM programs are career-changers—older students who may have a degree in another subject but who have worked in hotels and restaurants as a stopgap—or have years of experience and then go back to school to validate their skills. For this reason, the typical culinary or HRM major brings an unusual degree of maturity, commitment, and exposure to the field from his or her educational career. Couple that with the fact that many programs include a significant experiential component—a practicum, internship, or part-time job requirement—and you get a student body that's unusually employable.

"Our first priority in hiring management trainees is to find someone who has a demonstrated commitment to the industry through their work and academic experience," says Rudy La Kosh, director of employment for Solon, OH-based Stouffer Hotels and Resorts. "Most graduates of hospitality management programs are there because they know they want to work in the industry."

The schools are certainly well aware of this. The four-year hospitality degrees at Johnson & Wales in Providence, RI, for instance, are designed around a unique "upside-down" curriculum, wherein students are exposed to course work in their major right away, rather than waiting until their junior and senior years after their academic requirements are fulfilled. "We are front-loading the skills into the first two years so that students have the hands-on experience they need to get a part-time job right away," says Carolyn Cooper, chairman of the hospitality program at Johnson & Wales. "Even though the average age of our student is 18, most already have some industry job experience, and they want to get right into it."

At the Culinary Institute of America (CIA) in Hyde Park, NY, 45% of the current student body has had some prior college, and the average age at matriculation is 22. That continues to edge up, according to Tim Ryan, vice president of education. "Our students are very focused on culinary education, because they already know what they want. They come to the CIA for a total immersion in culinary studies; they won't be rooming with an engineering student here."

Which points up one of the fundamental differences between a culinary program and an HRM one: Culinary students are receiving technical skills, ones that will prepare them for a job in the kitchen or a food-and-beverage position at the assistant level. Four-year HRM students, on the other hand, are getting more theory, as well as a general academic background in liberal arts or humanities or business (depending upon the school), and are moving into management-training programs. Many employers say that's not enough.

"Our ideal graduate has both a two-year culinary degree and either a two-year or four-year hospitality management degree," says R. Wray Jones, vice president, director of food services for Neiman Marcus, the Dallas-based retail chain. "And that's the exact combination that I would recommend to anyone entering school today who wants to work in this industry. You have to have both management skills and culinary skills to really succeed, and none of the existing programs provide enough of both."

Indeed, many graduates from two of the better-known and more prestigious culinary programs in this country—the CIA and Johnson & Wales—go on to get management degrees. According to the CIA's Ryan, approximately 30% of the school's graduates transfer to an HRM program in order to gain enough managerial expertise to get on a career track as a corporate manager, executive chef, food and beverage manager, or even to open a restaurant. At Johnson & Wales, about 40% of the graduates of the school's two-year culinary program stay on for an additional two years to get their baccalaureate in foodservice management through J&W's hospitality division. "The successful manager of the '90s needs exposure to both back-of-house and front-of-house skills," says Thomas Wright, dean of culinary administration for Johnson & Wales, which also admits students with advanced standing into a one-year accelerated program in culinary arts or pastry arts.

IN DEPTH. In order to bolster the training they are able to give to their culinary students, both the CIA and Johnson & Wales have four-year culinary programs on the drawing board for the mid-1990s.

CONSTANCE BROWN

Inset: Johnson & Wales' assistant dean Jean-Michel Vienne with students. The dining room class is held in one of the school's practicum facilities, where hospitality students polish their service skills.

"In a two-year program, the problem becomes: How much can you teach these people before the bag breaks?" says Johnson & Wales' Wright. "Giving them two additional years to learn would allow us to really go in depth with the technical skills and add more theory." Both programs, say the schools, would continue to focus on culinary arts, but add additional management-oriented course work.

"This is truly the era of the educated chef," says L. Edwin Brown, executive director of the ACF. "Just working is not enough anymore, even if it's a series of jobs calculated to give you maximum exposure to the different skills needed to run a kitchen. And if you want to get into anything managerial—food and beverage, sales, catering—then transferring to an HRM program after culinary school or an apprenticeship is definitely the way to go. That's why it's especially important to go for an associate's degree, not just a certificate or a diploma."

ARA's De Vos chalks it up to the general decline in the number and scope of fine-dining opportunities in this country. "Fewer people want to work in the kitchens; they want to work in the front-of-the-house. And for that, they need to get other specialized skills."

Students at Cornell's School of Hotel Adminstration operate Statler Hall (inset), a working hotel. But Cornell also emphasizes culinary skills in food labs (above).

At least one school, however, teaches nothing but culinary skills, to students who want to work in fine kitchens. The French Culinary Institute in New York City offers an intensive, highly focused six-month program in classic cooking techniques that prepares students to work in upscale, white-tablecloth restaurants. "We get students who want to cook," says Dorothy Cann, the Institute's president. Graduates of the school, notes Cann, have been accepted into the kitchens of such prestigious restaurants as Le Cirque, Le Bernardin, and Bouley in New York City, and as far afield as Auberge d l'Ill, the Michelin three-star bastion in Alsace, France. Still, Cann points out that these are line positions, not chef's jobs, and that the real work of learning is still ahead. "We tell our students that they will be executive chefs in 10 years if they work hard. And if they want to learn about management, we advise them to begin by working in a well-managed restaurant."

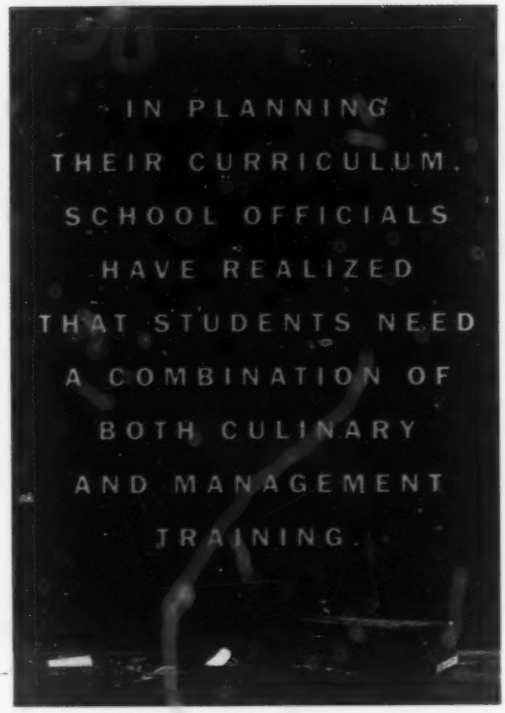
FOOD AND BEVERAGE. Many HRM programs are also addressing the industry's need for managers with significant exposure to the mechanics of food and beverage preparation and service. "We're not teaching our students how to run kitchens, but we are teaching them how to manage the people who are running the kitchens," says Mary Tanke, Ph.D., an associate professor at Florida International University (FIU) and chairman of the CHRIE-sponsored Accreditation Commission for Programs in Hospitality Administration. To that end, FIU has just opened new state-of-the-art food labs and requires what Tanke characterizes as a "heavier-than-average" load of food-and-beverage courses. "I don't think that the educational community has fully explored the potential for combining both culinary and management coursework in a single degree," adds Tanke. "It's a tall order because of the kinds of resources and facilities that are required, but it can be done."

Washington State University has also recently added new food lab facilities and is beefing up the food-and-beverage content of its baccalaureate program. "Laboratory courses are necessary to prepare the student for the field," says W. Terry Umbreit, Ph.D., director, Hotel and Restaurant Administration, College of Business and Economics, for the Pullman, WA-based school. "We will continue to concentrate on our proven strengths in accounting, business, and management, but adding the food-and-beverage component brings balance and diversity to the program."

"It's practical and advisable to integrate the two disciplines more," says Joseph Durocher, Ph.D., chairman, Department of Hotel Administration, University of New Hampshire. "A food and beverage manager doesn't need to know all the classic sauces, but he does need to have a basic background in food preparation. There's a mindset now of creative skills versus management skills that needs to change. Cooking schools need to integrate more management courses into their curriculums, and management programs need to offer more food and beverage. I think that 20 *continued on page 110*

years from now, you won't even be able to tell the difference between the culinary programs and the HRM ones." For its part, UNH's curriculum includes core courses in introductory and advanced food and beverage management.

MANAGEMENT NICHE. Still, there are plenty of schools that focus on management and front-of-the-house skills and are proud of it. "Many schools have developed a special focus in the area of management," says H.A. (Andy) Devine, Ph.D., director, school of Hotel and Restaurant Management, University of Denver. "In order to fit that depth of management concentration into four years, we have to soft-pedal the technical side, including culinary, in favor of management skills. Some programs—especially the ones operating within a college of business—are even more restricted, because they have to fulfill additional business requirements."



Within the framework of the management orientation, however, certain schools have obvious strengths or areas of specialization. Penn State, for instance, has revised its curriculum to provide more emphasis on noncommercial foodservice management. Washington State is known for its specialization in the area of quick service. "A few years ago, less than 5% of our graduates went into the QSR segment," says Umbreit. "Today, it's more like 15%." Although the school has also attempted to balance its curriculum more evenly between hotel and restaurant concentrations, it has developed a number of ongoing relationships with major QSR chains and offers one class plus a conference geared to the segment.

In general, the schools have been concentrating a little more on restaurant management, rather than on hotels as in the past. Partly, this is due to the slump in the hotel sector, but it's also due to the interests of students themselves.

One of the most well-known "hotel" programs is Cornell's, yet according to Fred H. Antil, Ph.D., special assistant to the dean for corporate relations and placement, more than one-third of Cornell's graduates go into foodservice positions. "Despite the fact that the industry still perceives us as a hotel school, we have long seen ourselves as a hospitality management school in the broadest sense," says Antil. "Our graduates are in restaurants, in airline feeding, B&I operations, country clubs. We are a management-oriented business school with a service focus."

Indeed, many schools report that as many as half of their graduates are moving into foodservice job, as recently as five years ago, close to 80% were choosing the hotel sector. "I think all of us, industry as well as educators, are starting to do a better job of telling students about the diversity of opportunities out there," adds Antil.

COLLEGE MARKET. One company that's been raising its profile is ARA. "Until recently, not that many students were attracted to a career in foodservice management, so we didn't do that much recruiting from the schools," says Joel Katz, ARA's director of human resources development. "Then, about four years ago, we realized that the college market was important to us, but first we needed to educate faculty and students to the advantages of working for a company like ARA. We had to make the college market appreciate us. Now, we are regarded as a preferred employee."

Apart from the obvious differences in curricula, schools have different cultures too, and as a result, graduate very different types of students. A lot of this has to do with proximity to education-related work experiences.

"One of our greatest strengths is our location in Boston," says Denise Dupré, director, School of Hotel and Food Administration, Boston University. "We require our

Above: Executive chef Lewis Reed shows off the new kitchen at Washington State University, Hotel and Restaurant Administration. The school's dining room facility at right is also new.

students to have two separate work experiences for a total of 800 hours, and because of the diversity of work options here in Boston, our students have a great deal of exposure to a variety of practical experiences."

Indeed, many recruiters classify graduates by their job experience. "Because our focus is on operations, we are looking for graduates with specific strengths in operations," says Mary Watson, regional vice president for the Garden Hotels division of Dallas-based Wyndham Hotels. (Garden Hotels, which accounts for 20 of Wyndham's 36 properties, are smaller hotels with single foodservice operations, and it is into this division that Wyndham recruits its managers in development.) "At schools like Northern Arizona University and University of Wisconsin-Stout, students are working during school and contributing to their own financial well-being. Not only do they have better levels of operational experience but they also are much more realistic about what it takes to make it in this inudstry. That's very attractive."

A full 80% of Wyatt Cafeterias' hirees come from culinary and restaurant management schools.

"Different schools do graduate very different kinds of people," says Susan Bastianello-Salazar, director of recruitment for Hilton Hotels. "Students from Florida International University or University of Nevada, Las Vegas, for example, tend to have more experience because of the job opportunities in those markets. And because the cost of living in those areas is relatively low, these schools attract career-changers, who tend to be older and more adept at combining the demands of work and family. Michigan State, on the other hand, is wonderful at teaching leadership skills and management theory, but the students have a harder time integrating these skills with experience because of the school's location out *continued on page 114*

ACCREDITATION

One of the major developments to hit the hospitality education field in recent years is uniform accreditation. Up until now, culinary and HRM programs have been accredited within the context of their "parent" institutions, resulting in an admixture of standards set by organizations ranging from the State Department of Education to NATTS, the accrediting body for vo-tech schools (which teach everything from culinary arts to plumbing).

Now the Council on Hotel, Restaurant and Institutional Education (CHRIE) and the American Culinary Federation Educational Institute (ACFEI), the educational arm of the American Culinary Federation, have rallied to begin accrediting hospitality programs on the basis of common, industry-accepted standards. In a pair of linked campaigns that should have long-ranging effects on the hospitality-education field, ACF began accrediting two-year culinary programs in 1986 (there are now 36 such programs accredited), and CHRIE will give the nod to its first batch of four-year HRM programs this summer. Both efforts are based on a self-study process undertaken by the schools themselves.

The benefits of CHRIE- or ACFEI-accreditation are multifold. According to L. Edwin Brown, executive director of the ACF, accreditation brings standardization to a field that has proliferated unregulated for the past two decades, and it also provides transferability and credibility for individuals completing ACFEI's apprenticeship in more than 100 two-year culinary programs around the country. (The three-year apprenticeship program, consisting of two years of education plus a year of industry experience is one of the primary points in ACF's drive to bring professionalism to the craft of culinary arts—along with accreditation and chef certification.)

According to Doug Adair, executive vice president of CHRIE, the accreditation program evaluates programs on the basis of four key areas: faculty, administration, student services, and the institution's support of the program. "Before this, there were no recommended standards for hospitality education, leaving the door open for anyone to take in students, even if the program was not up to industry requirements," says Adair. "The ultimate goal of accreditation is to provide a kind of quality assurance for hospitality administration programs, and to establish a common body of knowledge for all programs."

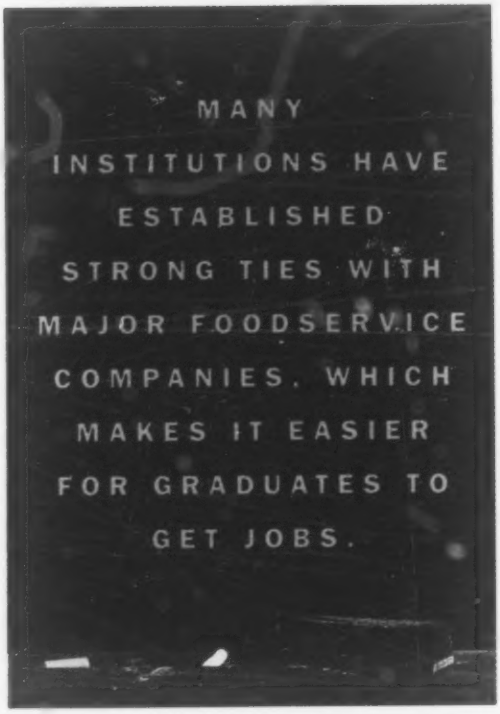
There will be other, long-term benefits as well. It will be easier for program administrators to squeeze budgets from the parent institution if the program is accredited, for one thing, which could utimately lead to more full-time faculty, more scholarships, more facilities. "Some school administrators have traditionally looked to the hospitality program as a cash cow because it's such a growth field, without necessarily making a proportionate investment in the program," says Mary Tanke, Ph.D., chairman of CHRIE's Ïaccreditation commission and an associate professor at Florida International University.

"Accreditation will, in the long run, increase the quality of hospitality education in this country."

there in East Lansing. Fortunately, a company the size of Hilton can actually benefit from all that diversity."

IS BIGGER BETTER? Size is also important. "With 1,850 students and more than 100 faculty members, we are able to offer our students the benefits of exposure to a large number of different viewpoints and experiences," says the CIA's Ryan. "In addition, we have 22,000 alumni out in the field who have already gained position and prominence in the industry, and that's a major advantage for graduates."

For many smaller schools, achieving this kind of size and impact is an important strategy for the future. Boston University's program, now 10 years old, currently enrolls 300. Over the next few years, says Dupré, that number will increase to 500, allowing the school to invest in more full-time faculty and facilities, and to attract more recruiters with more job offers. "It's really important that the core courses be taught by full-time rather than adjunct faculty," says Dupré. "But you need a certain critical mass to achieve that."



Yet not every potential employer would agree with this. ARA's De Vos, for one, prefers to hire his chefs from smaller schools like Kendall College (about 180 students) and Sullivan College (with 150 students in culinary arts). "In the smaller programs, the students are learning from the instructors themselves, not from the associate instructors, and they're getting more individualized training and monitoring. In addition, the smaller programs tend to get older students—very few come straight out of high school."

Faculty profile also has an impact on the nature of a school's program. At the CIA, two-thirds of the faculty are working chefs or former chefs; one-third are degreed professionals. At Johnson & Wales, the faculty tends to create more of a balance between educators and industry professionals. "When it all boils down to it, though, we'll take 20 years of industry experience over a degree, anytime," says Johnson & Wales' Cooper.

And at research-oriented facilities like Penn State and Georgia State, the Ph.D. is more of a priority. "Many of the four-year programs have put their emphasis on academic credentials over industry experience," says University of Denver's Devine. "The older tenured professors traditionally came out

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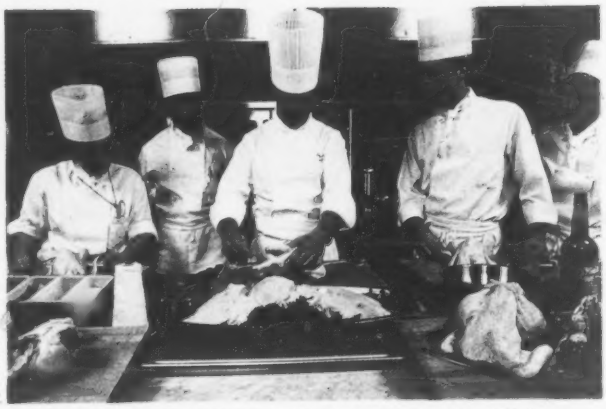
CONTINUING ED

In addition to their role as primary educators, the schools play an important part in the industry's continuing education. Schools such as Johnson & Wales and the Culinary Institute of America as well as many community colleges, offer a regular program of courses to professionals—everything from one- and two-day seminars to semester-long courses—designed to keep chefs and managers current. In addition, many schools custom-design training programs and other continuing-education opportunities for a variety of businesses.

According to Tim Ryan, vice president of education for the CIA, more than 2,000 industry professionals receive some sort of continuing education at the CIA every year, either through corporate-sponsored training or individually; many are chefs undergoing the process of certification or recertification. CIA was the first school to offer continuing ed year-round, says Ryan, and the first to have a separate facility dedicated to the ongoing training of industry. Most popular these days, adds Ryan, are nutrition-oriented courses, but typical subjects include garde manger, quantity food production, culinary update for educators, and career exploration, as well as such cuisine-based courses as Far Eastern and Eastern European cooking. The school is now looking at northern California as an auxiliary continuing-ed location and as a pivot point for an eventual West Coast campus.

Johnson & Wales is also very active in the area of continuing education. According to Thomas Wright, dean of culinary administration, the target market for continuing ed includes not only chefs and managers but also HRM and culinary educators, manufacturers, and others allied to the industry. And full-time workers in pursuit of an associate's degree can take their classes on weekends.

"Schools, especially community colleges and other locally based institutions, are a tremendous but often overlooked resource for ongoing training," notes Edward Sherwin, chairman, Hotel-Motel/Restaurant-Club Management Department, Essex Community College, Baltimore, MD which does contract training for local hospitality companies. "We can bring the methodology and expertise to the educational process that corporate trainers often lack."



JONATHAN PITE

The French Culinary Institute, NYC, offers an intensive, highly focused six-month program in classic cooking techniques.

universities have been hiring younger faculty with good academic backgrounds but less industry experience. The trick is to achieve a balance."

The industry itself tends to look askance at the need for a terminal degree, however. "Lee Iaccoca doesn't have a Ph.D., but wouldn't you want to take a business course from him?" says ARA's Katz. For another thing, getting a Ph.D. is an expensive proposition, and only a handful of schools offer the degree within the context of a hospitality program.

SHORTAGE OF TEACHERS. Yet there continues to be a grave shortage of qualified educators. "I'm not denigrating adjunct faculty," says UNH's Durocher, "but these kids need teachers who are available to them at all times, who can provide that direction and continuity that only a full-time academician can. Too many schools try to beef up their faculties with part-time teachers, but while this enhances professionalism and industry experience, you don't get the same level of commitment. There has to be a balance between experience and academics."

Mike Hurst feels that in order to meet the growing demand for qualified teachers, the industry must change its definition of scholarship. "You have to invest in lifting the exposure of teachers to industry," he insists. "Give teachers resources and contacts. Give the schools money so that educators can get out into the industry and attend seminars and shows. A dollar spent on a scholarship for a teacher has a bigger payoff than a dollar spent on a scholarship for a student, because the teacher will pass his knowledge along, year after year."

Educators refer to this as the Ivory Tower Syndrome, and many will jump at the chance to get out of it. Earlier this year, University of Denver's Devine took a leave of absence from his former position as a professor at Penn State to take part in a cooperative project to examine issues of beverage management and control—lessons that Devine will incorporate into the curriculum this fall. And this summer, in a joint venture with Marriott, ARA brought six faculty members from hospitality management programs around the country in for an internship program. In addition to sharing skills with educators, the program helps raise the profile of the foodservice management sector in general—and these two companies in particular—among the people who are most likely to pass this information on. *continued on page 120*

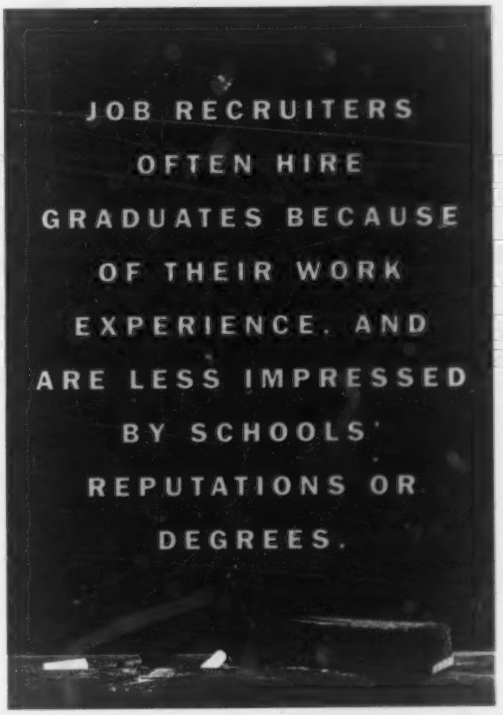
CERTIFICATION

Anyone who's stood in a doctor's office reading all the diplomas knows the value of that piece of sheepskin. But there is also great value in experience, and in an industry like hospitality, experience is often the common currency—and certification is the documentation.

The American Culinary Federation Educational Institute (ACFEI), the education arm of the ACF, has certified more than 5,000 professional chefs on the basis of work experience, education, and professional association with the ACF. Points are accumulated for a variety of career accomplishments, from years in the field to school course work or equivalency, in order to gain certification at any of nine professional levels, including certified master chef, certified executive chef and executive pastry chef, and certified culinary educator. According to ACF executive director L. Edwin Brown, certification is a necessary tool in today's competitive environment. "Certification means that an indivudal has demonstrated proficiency in a variety of different areas, including nutrition, sanitation and safety, and supervisory development. And because recertification entails 80 hours of continuing education every five years, the system is also dedicated to keeping chefs and culinary educators current in their fields."

This May, the Educational Foundation of the National Restaurant Association (NRAEF) announced its new Foodservice Management Professional (FMP) Certification Program, providing similar credentials and certification to foodservice managers. According to Ellen Moore, director of certification and instructional services, the program gives managers an opportunity to document their career progress, and gives industry a chance to recognize managers as the professionals they are. "It's been difficult for managers to gain acceptance from their peers and the community at large," says Moore, "but this program provides that recognition and also helps promote the image of the industry as a career for professionals." Like the ACFEI certification, the FMP program recognizes a flexible array of industry and educational experiences and provides a standard by which disparate backgrounds can be evaluated. The FMP certification program, launched in July, calls for recertification every three years, and is available to current foodservice unit managers, multi-unit managers, corporate executives, educators in the field of foodservice management, and corporate management trainers.

ROLE OF COMMUNITY COLLEGES. The schools are returning the favor through continuing education. Elgin Community College in Elgin, IL, for instance, which grants two-year associate's degrees in both culinary arts and hospitality management, has custom-designed a training program for foodservice employees at nearby Motorola. According to Mike Zema, CCE, Elgin's coordinator of hospitality management, community colleges are ideally suited to continuing education because they are so closely linked to their local markets. "We have taught week-long seminars in culinary arts to local home-economics teachers, we teach adult education courses to the local community, and our curriculum is flexible enough to allow us to tailor training programs for local companies." Adult education, adds Zema, is an important way to reach the large base of older potential career-changers who are interested but lack confidence.



The community colleges have other, vital roles in the education link. In addition to appealing to older students who are changing careers or returning to school after some time in the workplace, two-year programs provide a valuable source of lower-level management talent. "Companies are rightly tapping the four-year programs for their mid-level management needs and management training programs," says Edward Sherwin, chairman, Hotel-Motel/Restaurant-Club Management Department, Essex Community College in Baltimore, MD. Although Essex, like Elgin Community College, encourages its graduates to go on to a baccalaureate program (many ECC graduates take the two-year culinary program and two-year management program instead), Sherwin believes that graduates of the two-year management programs are often overlooked by recruiters.

"Many of our graduates come into the program with five or 10 years of experience, and they're coming back to school to validate their skills," says Sherwin. "In addition, companies should be looking to us as a place to send their employees for additional skills. There's too much in-house training being carried out by people who lack the proper qualifications. We're educators, and we can have an important role in the ongoing training of the industry."

Many community colleges and vo-techs, lacking the resources to develop their own curriculums or the visibility to guarantee their graduates the credentials they want, have turned to the NRA Educational Foundation's Diploma Program. An outgrowth of the Foundation's Applied Foodservice Sanitation course, now offered in more than 350 educational locations and about 70 corporate management training programs, the diploma program recognizes what sales manager Kathleen Wood calls a "common body of knowledge" in foodservice. Fifty schools in 18 states now offer the diploma program, the majority of them two-year institutions. In addition, the program is being made available to individuals who are already out in the industry but who seek recognition of existing skill levels, and for corporate trainers to use in their in-house training programs. Consisting of eight courses or equivalency in the areas of human resources, finance, administration, marketing, and operations, plus the sanitation component, the diploma program provides a means for teaching and documenting the essentials of foodservice.

Zema of Elgin Community College, which recently added the diploma program to its existing two-year management degree, says: "The diploma program is a good tool for us because while employers in Illinois may know Elgin Community College, what happens when the graduate moves to Ohio? The diploma program establishes indus-try proficiency and makes it trans-ferable throughout the country. It also places a quantifiable value on industry experience."

BUILDING PROFESSIONALISM. All of which helps to address another major problem faced by the hospitality education field: Getting students interested in the industry in the first place. "This industry has never had to recruit and develop young people on its own," notes Mike Hurst. "We've hired plenty of employees but we've never had to develop chefs and managers and supervisors. In addition to that, we have an image as a place to work, not as a career opportunity."

Hurst, like many of his colleagues, proposes that the industry begin with high-school students, launching a full-fledged marketing program to make foodservice more appealing to career-oriented teenagers. To that end, Hurst has urged state associations to commit to an ongoing effort to educate guidance counselors, principals, and teachers.

Even more, industry must also learn to accommodate students from the HRM and culinary schools. "Companies need to work with students to make them more aware of what the opportunities and challenges are," says Cornell's Antil. "They have to become more creative and more flexible in their recruiting and hiring practices. They have to look at these kids as individuals and be sensitive to their aspirations. There are a lot of bright young people graduating today who are not afraid of hard work—they're just afraid of getting lost." RB

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TYPES OF DEGREES OFFERED

Program Type	Institutional Setting	Curriculum Objectives	Completion Time	Faculty
Certificate and Diploma Programs	Business, Technical and Career Institutes	Provide students w/ specialized skills for specific hospitality jobs	1-3 years	Primarily industry and training. May also have B.S./ B.A.; some have graduate degrees
Associate Degree Granting Programs*	Community Colleges and Vocational-Technical Schools	Provide training and education for hospitality management careers. Emphasis on career education and technical skills, but curricula includes general education components. Some degrees transferrable to baccalaureate programs	2 years	Same
Baccalaureate Degree Granting Programs (B.S., B.A.)	Four-year Colleges and Universities	Career education in combination with broad general studies component and advanced learning skills. Emphasis on conceptual abilities and integrating knowledge with other disciplines	4 years	Combination of industry experience, graduate education. Heavy emphasis on graduate education
Graduate Degree Granting Programs (M.S., Ph.D.)	Universities	Advanced education for specialized industry positions or future educators. Emphasis on creating interdisciplinary base for applied studies and research, policy analysis, planning and theoretical education	1-2 years (Masters) 3-5 years (Doctorate)	Doctoral education; industry experience not always required

* Includes Associate of Science; Associate of Applied Science; Associate of Applied Arts and Sciences; Associate in Occupational Studies; Associate of Arts;Associate of Applied Business; Associate of Technical Arts; Associate in Food Service/Restaurant Management; Associate in Hotel-Motel Management,Restaurant/Club Management

SOURCE: Council on Hotel, Restaurant and Institutional Education

RESOURCES

American Culinary Federation

10 San Bartolla Rd.
St. Augustine, FL 32084
904/824-4468

Scholarships (limited to ACF members); accreditation; certification; education; career information

Council on Hotel, Restaurant and Institutional Education

1200 17th St., N. W.
Washington, DC 20036
202/331-5990

Nonprofit organization "fostering the international advancement of teaching, training, learning, research, and practice in the field of hospitality and tourism management." Accreditation, education, career information

Educational Foundation of the National Restaurant Association

250 S. Wacker Dr., Ste. 1400
Chicago, IL 60606
312/715-1010

Scholarships; management certification; education; career information

Educational Institute of the American Hotel & Motel Association

1407 S. Harrison Rd., P.O. Box 1240
East Lansing, MI 48226
517/353-5500

Education; career information

THE SCHOOLS: TWO-YEAR PROGRAMS

Baltimore's Intl. Culinary College

Professional Cooking/Professional Baking & Pastry/Innnkeeping/ Restaurant Management

Director of Admissions
Baltimore's Intl. Culinary College
Harbor Campus
Baltimore, MD 21202
301/752-4710

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Program Enrollment: 350
Degrees Awarded: Associate of Arts, Certificate
Degree Categories: Associate of Arts in Professional Cooking, Professional Baking & Pastry, Innkeeping, Restaurant Mgmt.; Certificate in Professional Cooking, Professional Baking & Pastry, Innkeeping, Restaurant Mgmt.

California Culinary Academy

Professional Chef Program

Dr. Thomas Bloom
President/CEO
California Culinary Academy
625 Polk St.
San Francisco, CA 94103
415/771-3536

Program Enrollment: 525
Degree Awarded: Diploma (Professional Chef)
Emphasis/Specialization: Four-month Senior Pastry Apprenticeship

Culinary Institute of America

Culinary Arts, Baking & Pastry Arts

Cathy Grande
Director of Admissions
Culinary Institute of America
651 S. Albany Post Rd.
Hyde Park, NY 12538
914/452-9430

Program Enrollment: 1,850
Degree Awarded: Associate in Occupational Studies
Degree Categories: Culinary Arts, Baking & Pastry Arts

Community College of Southern Nevada

Hotel, Restaurant, and Casino Management

Dr. Russell E. Anderson
Department Chairman
Hotel, Restaurant and Casino Mgmt.
Clark County Community College
North Las Vegas, NV 89030
702/643-6060

Program Enrollment: 800
Degrees Awarded: Associate of Applied Science, Associate of Arts, Certificate of Achievement
Emphasis/Specializations: Hotel Mgmt., Restaurant Mgmt., Casino Mgmt., Hospitality & Casino Marketing, Hotel Admin., Culinary Arts

Educational Foundation of the National Restaurant Association

Food Service and Hospitality Management

Marc J. Gordon
Senior Director
Sales & Marketing
The Educational Foundation of the National Restaurant Association
250 S. Wacker Dr., Suite 1400
Chicago, IL 60606
312/715-1010

Degrees Awarded: National Restaurant Assoc. Mgmt. Diploma, Course Completion Certificates, Food Service Mgmt. Professional Certification
Degree Categories: Food Service Mgmt., Adminstration Mgmt., Financial Mgmt., Human Resource Mgmt., Marketing Mgmt., Operations Mgmt.

Educational Institute of the American Hotel & Motel Association

Hotel, Motel, and Food Service Management

E. Ray Swan
President
Educational Institute of the American Hotel & Motel Association
1407 S. Harrison Rd., P.O. Box 1240
East Lansing, MI 48826
517/353-5500

Degrees Awarded: Hospitality Mgmt. Diploma, Course Completion Certificate, Certificate of Specialization
Degree Categories: Rooms Division Mgmt., Food & Beverage Mgmt., Marketing & Sales Mgmt., Engineeering & Facility Mgmt., Acctg. & Financial Mgmt.

Elgin Community College

Hospitality Program

Mike Zema
Chairman
Hospitality Program
Elgin Community College
1700 Spartan Drive
Elgin, IL 60123
708/697-1000, ext. 7554

Program Enrollment: 150
Degrees Offered: Associate of Science
Degree Categories: Hospitality Management, Culinary Arts

Essex Community College

Hotel-Motel/Restaurant-Club Management

Edward Sherwin
Chairman,
Hotel-Motel/Restaurant-Club Mgmt. Dept.
Essex Community College
Baltimore County, MD 21237
301/522-1456

Program Enrollment: 350 credit/ 1,150 noncredit
Degrees Awarded: Associate in Arts, Certificate, Letter of Recognition
Degree Categories: Associate in Hotel-Motel Mgmt., Restaurant-Club Mgmt.; Certificate in Hotel-Motel Mgmt., Restaurant-Club Mgmt.; Letter of Recognition in Institutional and School Food Service, Hospitality & Tourism

French Culinary Institute

Culinary Arts

Director of Admissions
French Culinary Institute
462 Broadway
New York, NY 10013
212/219-8890

Program Enrollment: 80
Degree Offered: Certificate

Johnson & Wales University

Culinary Arts Division

Richard Brush
Director of Hospitality Education
8 Abbott Park Pl.
Johnson & Wales University
Providence, RI 02903
401/456-1000

Program Enrollment: Culinary, 1,800
Degrees Awarded: Associate in Occupational Science (AOS), Associate in Science (A.S.)
Degree Categories: AOS in Culinary Arts, Baking & Pastry Arts; AS in Hotel-Restaurant Mgmt., Food & Beverage Mgmt., Restaurant/Institution Mgmt., Recreation/Leisure Mgmt., and

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Travel/Tourism
Campuses are also maintained at Charleston, SC (Culinary Arts/Hospitality) and Norfolk, VA (Culinary Arts)

Kendall College

The Culinary School

Director of Admissions
Kendall College
2408 Orrington Ave.
Evanston, IL 60201
708/866-1304

Program Enrollment: 180
Degrees: Associate in Applied Science, Associate of Arts, Bachelor of Arts
Degree Categories: Associate in Culinary Arts, Hospitality Mgmt.; Bachelor in Hospitality Mgmt.

New England Culinary Institute

Culinary Arts

Admissions Director
New England Culinary Institute
RR #1, 250 Main St.
Montpelier, VT 05602
802/223-6324

Program Enrollment: 370
Degree Awarded: Associate in Occupational Studies
Degree Category: Culinary Arts

New York Institute of Technology

Culinary Arts

Francis X. Brown
Dean
School of Hotel Admin. and Culinary Arts
New York Institute of Technology
Carleton Ave.
Central Islip, NY 11722
516/348-3290

Program Enrollment: 550
Degrees Awarded: Associate in Occupational Studies
Degree Categories: Culinary Arts

Pennsylvania Institute of Culinary Arts

Culinary Arts

Scott Root
Admissions Director
Pennsylvania Institute of Culinary Arts
700 Clark Bldg.
717 Liberty Ave.
Pittsburgh, PA 15222
412/566-2444

Program Enrollment: 500
Degree Awarded: Specialized Associate
Degree Category: Culinary Arts

BACCALAUREATE/ GRADUATE PROGRAM

Boston University

School of Hotel and Food Administration

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Denise Dupré
Director
School of Hotel and Food Administration
Boston University
808 Commonwealth Ave.
Boston, MA 02215
617/353-3261

Program Enrollment: 300
Degree Awarded: Bachelor of Science
Degree Categories: Hotel and Food Adminstration
Emphasis/Specialization: Intl. Hosp. Mgmt., Financial Mgmt., Marketing Mgmt., Mmgt. Information Systems, Food & Beverage Mgmt.

California State Polytechnic University Pomona

Hotel and Restaurant Management

Dr. Robert W. Small
Director
Center for Hosp. Mgmt.
California State Polytechnic, Pomona
3801 W. Temple Ave.
Pomona, CA 91768
714/869-2275

Program Enrollment: 800
Degree Awarded: Bachelor of Science
Degree Category: Hotel and Restaurant Management
Emphasis/Specialization: Food & Bev. Mgmt., Hotel Mgmt.

Cornell University

Hotel Administration

Cheri Farrell
Director of Admissions
School of Hotel Administration
Cornell University
Statler Hall
Ithaca, NY 14853
607/255-6376

Program Enrollment: 670 undergraduate; 100 graduate
Degrees Awarded: Bachelor of Science, Master of Professional Studies, Master of Science, Doctor of Philosophy
Degree Category: Hotel Administration
Emphasis/Specialization: Operations Mgmt., Human Resources Mgmt., Financial Mgmt., Information Systems, Food & Beverage Mgmt., Marketing, Properties Mgmt., Entrepreneurship

East Stroudsburg University

Hospitality Management

Albert J. Moranville
Chairperson
Hospitality Management Department
East Stroudsburg University
East Stroudsburg, PA 18301
717/424-3511

Program Enrollment: 300
Degree Awarded: Bachelor of Science
Degree Category: Hospitality Mgmt.

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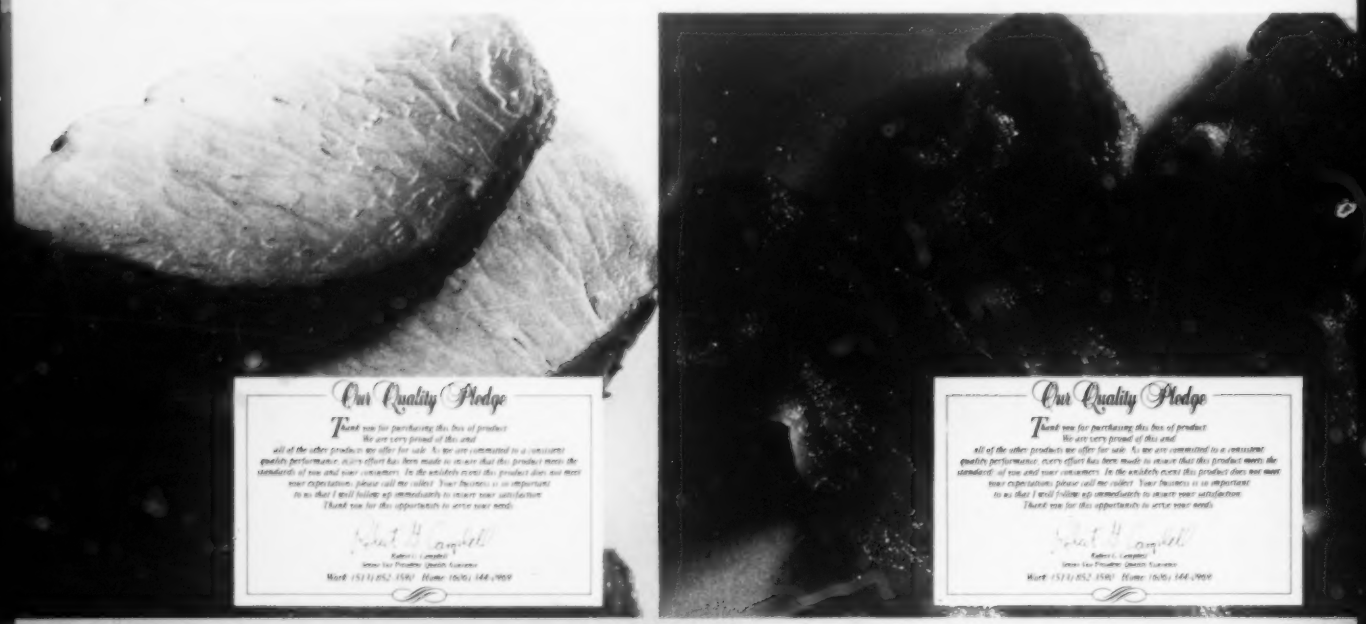

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...rs Inc. Sherman Oaks, CA

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Florida International University

Hospitality Management, Hotel and Food Service Management

Anthony G. Marshall
Dean
School of Hospitality Management
Florida International University
North Miami Campus
North Miami, FL 33181
305/948-4500

Program Enrollment: 850 undergraduate; 150 graduate
Degrees Awarded: Bachelor of Science, Master of Science
Degree Categories: Bachelor in Hospitality Mgmt., Master in Hotel & Food Service Mgmt.
Emphasis/Specialization: Hotel, Food & Beverage, and Club Mgmt.

Florida State University

Hospitality Administration

Dante M. Laudadio
Chairman
Hospitality Administration
Florida State University
225 William Johnson Bldg.
Tallahassee, FL 32306
904/644-4787

Program Enrollment: 325
Degrees Awarded: Bachelor of Science
Degree Categories: Hospitality Administration

Georgia State University

Cecil B. Day School of Hospitality Administration

David V. Pevesic
Director
Cecil B. Day School of Hospitality Administration
1202 Urban Life Bldg.
College of Public & Urban Affairs
Georgia State University
Atlanta, GA 30303
404/651-3512

Program Enrollment: 300
Degree Awarded: Bachelor of Science
Degree Category: Hospitality Administration
Emphasis/Specialization: Fairs/Tradeshow Mgmt., Club Mgmt., Hotel Mgmt., Restaurant Mgmt.

Golden Gate University

Hotel, Restaurant, Institutional and Tourism Program

N. Earl Austin
Director
Hotel, Restaurant, Institutional and Tourism Programs
College of Business Administration
Golden Gate University
536 Mission St.
San Francisco, CA 94105
415/442-7215

Iowa State University

Hotel, Restaurant, and Institution Management

Dr. Thomas E. Walshy
Department Head
Hotel, Restaurant, and Institution Management
11 MacKay Hall
Iowa State University
Ames, IA 50011
515/294-1730

Program Enrollment: 400
Degrees Awarded: Bachelor of Science, Master of Science, Doctor of Philosophy
Degree Categories: Hotel and Restaurant Mgmt., Foodservice Mgmt.

Johnson & Wales University

Hospitality Program

Caroline Cooper
Department Chair
Xavier Academic Complex
Johnson & Wales University
8 Abbott Park Pl.
Providence, RI 02903
401/456-1475

Program Enrollment: Hospitality Program: 2,600
Degrees Awarded: Bachelor of Science (BS), Master of Science (MS), Master of Business Administration (MBA)
Degree Categories: BS in Hosp. Mgmt., Hotel-Restaurant/Institutional Mgmt., Hosp. Sales & Marketing Mgmt., Food Service Mgmt., Travel-Tourism Mgmt., Travel-Tourism Marketing; MS in Hosp. Admin.; MBA in Intl. Business

Kansas State University

Hotel and Restaurant Management

Pat Pesci
Program Director
Hotel and Restaurant Management
Kansas State University
Manhattan, KS 66506
913/532-5521

Program Enrollment: 300
Degree Awarded: Bachelor of Science
Degree Category: Hotel and Restaurant Mgmt.

Michigan State University

School of Hotel, Restaurant and Institutional Management

Dr. Ronald F. Cichy
Director
School of Hotel, Restaurant and Institutional Management
Michigan State University
424 Eppley Center
East Lansing, MI 48824
517/355-5080

Program Enrollment: 800 undergraduate; 15 graduate
Degrees Awarded: Bachelor of Arts in Business Adminsistration, Master of Business Administration
Degree Categories: Hotel, Restaurant and Institutional Mgmt.

New York City Technical College

Hotel and Restaurant Management

Patricia S. Bartholomew
Chair
Hotel and Restaurant Management Department
New York City Technical College
300 Jay St., Room 220
Brooklyn, NY 11201
718/260-5630

Program Enrollment: 850
Degrees Awarded: Associate in Applied Science, Bachelor of Technology
Degree Categories: Hotel and Restaurant Mgmt.

New York Institute of Technology

Hotel Administration

Francis X. Brown
Dean
School of Hotel/Restaurant Administration and Culinary Arts
New York Institute of Technology
Carleton Ave.
Central Islip, NY 11722
516/348-3290

Program Enrollment: 550
Degree Awarded: Bachelor of Professional Studies
Degree Categories: Hotel Administration

Northern Arizona University

School of Hotel and Restaurant Management

Peter VanKleek
Dean
School of Hotel and Restaurant Management
Northern Arizona University
Box 5638
Flagstaff, AZ 86011

Program Enrollment: 750
Degree Awarded: Bachelor of Science
Degree Categories: Hotel and Restaurant Mgmt.
Emphasis/Specialization: Resort Mgmt., Restaurant Mgmt., Intl. Hosp. Operations

Ohio State University

Hospitality Management

E. Francis Pauze
Program Director
Hospitality Management
Ohio State University
265 Campbell Hall
1787 Neil Ave.
Columbus, OH 43210
614/292-1474

Program Enrollment: 330 undergraduate
Degrees Awarded: Bachelor of Science, Master of Science, Doctor of Philosophy
Degree Categories: Hotel Admin., Food Service Mgmt.

Oklahoma State University

School of Hotel and Restaurant Administration

Jim L. Anderson
Interim Director

continued on page 134

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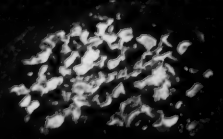

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School of Hotel and Restaurant Administration
Oklahoma State University
210 Home Economics West
Stillwater, OK 74078
405/744-8486

Program Enrollment: 325
Degree Awarded: Bachelor of Science, Master of Science (pending Fall '91)
Degree Categories: Hotel Admin. and Restaurant Mgmt.
Emphasis/Specialization: Business Admin.

Oregon State University

Hotel, Restaurant and Tourism Management

E. Alan Kluge
Program Director
Hotel, Restaurant and Tourism Management
Oregon State University
Bexell Hall 201
Corvallis, OR 97331
503/737-3693

Program Enrollment: 300
Degrees Awarded: Bachelor of Science, Bachelor of Arts
Degree Categories: Hotel, Restaurant and Tourism Mgmt.

Pennsylvania State University

School of Hotel, Restaurant and Institutional Management

Stuart Mann
Acting Director
School of Hotel, Restaurant and Institutional Management
Pennsylvania State University
118 Henderson Bldg.
University Park, PA 16802
814/863-0009

Program Enrollment: 650
Degree Awarded: Bachelor of Science
Degree Category: Hotel, Restaurant and Institutional Mgmt.
Emphasis/Specialization: Restaurant and Food Service Mgmt., Hotel Mgmt., Mgmt. Dietetics, Institutional Mgmt.

Purdue University

Restaurant, Hotel, and Institutional Management

Lee M. Kreul
Department of Restaurant, Hotel and Institutional Management
Purdue University
105 Stone Hall
West Lafayette, IN 47907
317/494-4643

Program Enrollment: 900
Degrees Awarded: Associate in Applied Science, Bachelor of Science, Master of Science, Doctor of Philosophy
Degree Categories: Restaurant, Hotel, and Institutional Mgmt.
Emphasis/Specialization: Hosp. Mgmt., Hotel Mgmt., Restaurant Mgmt., Tourism, Institutional Mgmt.

Rochester Institute of Technology

School of Food, Hotel, and Tourism Management

Dr. Francis M. Domoy
Director
Rochester Institute of Technology
School of Food, Hotel, and Tourism Management
Rochester, NY 14623
716/475-5576

Program Enrollment: 578 undergraduate; 72 graduate
Degrees Awarded: Bachelor of Science, Master of Science
Emphasis/Specialization: Hotel/Resort Mgmt., Food Mgmt., Travel Mgmt., Dietetics

Southwest Missouri State University

Hospitality and Restaurant Administration

Hank Huitt
Director
Hospitality and Restaurant Administration
Southwest Missouri State University
901 S. National
Springfield, MO 65804

Program Enrollment: 350
Degree Awarded: Bachelor of Science
Degree Category: Hospitality and Restaurant Administration

Texas Tech University

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Director
Restaurant, Hotel, and Institutional Management
Box 4170
Texas Tech University
Lubbock, TX 79409
806/742-3661

Program Enrollment: 700
Degrees Awarded: Bachelor of Science
Degree Category: Restaurant, Hotel and Institutional Management

University of Central Florida

Hospitality Management

Abraham Pizam
Chair
Dept. of Hospitality Management
University of Central Florida
Orlando, FL 32816
407/823-2188

Program Enrollment: 350
Degree Awarded: Bachelor of Science
Emphasis/Specialization: Hotel/Motel Mgmt., Foodservice Mgmt., Tourism Mgmt., Convention and Conferences Mgmt.

University of Denver

School of Hotel and Restaurant Management

H.A. Devine
Director
School of Hotel and Restaurant Management
University of Denver
Denver, CO 80208
303/871-2322

Program Enrollment: 300
Degree Awarded: Bachelor of Science
Degree Categories: Business Administration

University of Houston

Hotel and Restaurant Management

Dr. Joseph J. Cioch
Dean
Conrad N. Hilton College of Hotel and Restaurant Management
University of Houston
Houston, TX 77204

Program Enrollment: 900
Degrees Awarded: Bachelor of Science, Master of Hospitality Administration

University of Massachusetts/Amherst

Department of Hotel, Restaurant, and Travel Administration

Stevenson M. Fletche
Department Head
Department of Hotel, Restaurant, and Travel Administration
University of Massachusetts
Amherst, MA 01002
413/545-2535

Program Enrollment: 652
Degrees Awarded: Bachelor of Science, Master of Science
Degree Categories: Hotel ,and Restaurant Admin., Travel & Tourism

University of Nevada, Las Vegas

William F. Harrah College of Hotel Administration

Dr. David Christianson
Dean
William F. Harrah College of Hotel Administration
University of Nevada, Las Vegas
4505 Maryland Parkway
Las Vegas, NV 89154
702/739-3230

Program Enrollment: 1,550
Degree Awarded: Bachelor of Science
Degree Category: Hotel Administration
Emphasis/Specialization: Accounting, Computers, Clubs, Food & Beverage, Foreign Language, Gaming, Conventions/ Trade Shows, Travel & Tourism

University of New Hampshire

Hotel Administration Department

Dr. Joseph Durocher
Department Chair
Department of Hotel Administration
University of New Hampshire
McConnell Hall
Durham, NH 03824
603/862-3387

Program Enrollment: 250

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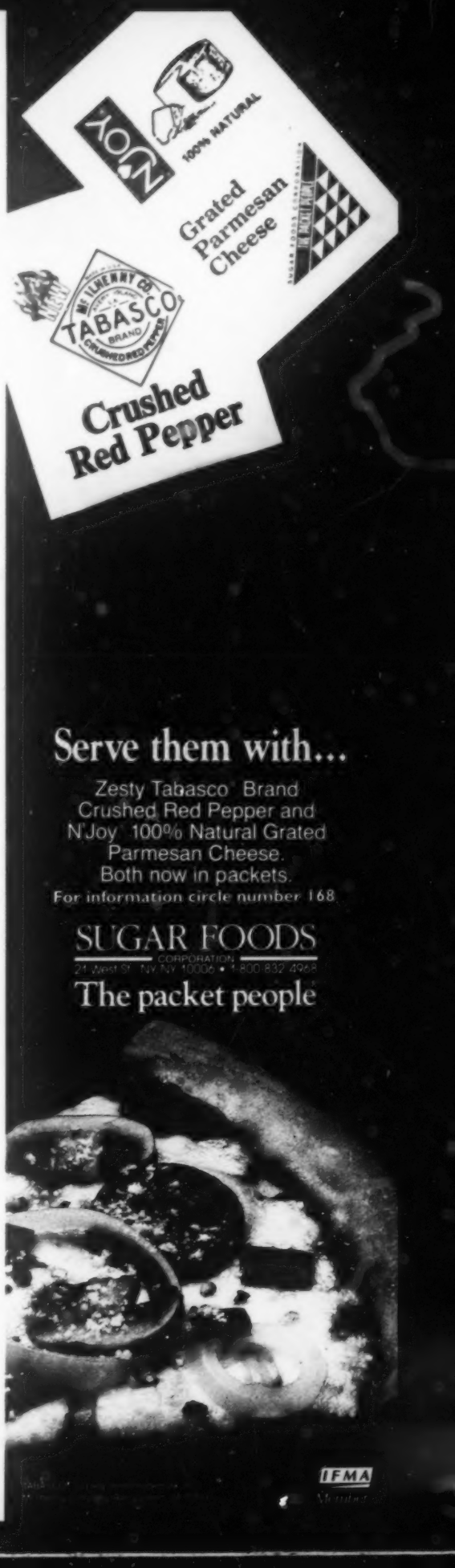
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Degrees Awarded: Bachelor of Science, Master of Business Administration

University of New Haven

Hotel, Restaurant, and Tourism Administration

Warren J. Smith
Dean
School of Hotel, Restaurant, and Tourism Administration
University of New Haven
300 Orange Ave.
West Haven, CT 06516
203/932-7362

Program Enrollment: 350 undergraduate; 30 graduate
Degrees Awarded: Bachelor of Science, Associate in Science, Certificate, Master of Business Administration
Degree Categories: Hotel and Restaurant Mgmt., Tourism & Travel Admin., Dietetics

University of New Orleans

School of Hotel, Restaurant, and Tourism Administration

Dr. Jeffrey D. Schaffer
Director
School of Hotel, Restaurant, and Tourism Administration
College of Business Administration
University of New Orleans
New Orleans, LA 70148
504/286-6385

Program Enrollment: 400
Degree Awarded: Bachelor of Science
Degree Category: Business Administration

University of North Texas

Division of Hotel and Restaurant Management
D. Richard F. Tas
Director
Division of Hotel and Restaurant Management
School of Human Resource Management
University of North Texas
P.O. Box 5428
Denton, TX 76201
817/565-2436

Program Enrollment: 400
Degree Awarded: Bachelor of Science
Degree Category: Hotel and Restaurant Mgmt.

University of South Carolina

Hotel, Restaurant, and Tourism Administration

Dr. Melvin N. Barrington
Chairman
Hotel, Restaurant, and Tourism Administration
University of South Carolina
Columbia, SC 29208
803/777-6665

Program Enrollment: 450
Degree Awarded: Bachelor of Science
Degree Category: Hotel, Restaurant, and Tourism Administration

University of Tennessee, Knoxville

Hotel and Restaurant Administration

Mark McGrath
Director
Hotel and Restaurant Administration
College of Human Ecology
University of Tennessee
Knoxville, TN 37996
615/974-5445

Program Enrollment: 400
Degree Awarded: Bachelor of Science
Emphasis/Specialization: Food Mgmt., Hotel Mgmt.

University of Wisconsin-Stout

Hotel and Restaurant Management

Dr. Donald Diekelman
Program Director
Hotel and Restaurant Management
220 Home Economics
University of Wisconsin-Stout
Menomonie, WI 54751
715/232-1407

Program Enrollment: 1,215
Degree Awarded: Bachelor of Science
Emphasis/Specialization: Minors in Business Admin., Property Mgmt., Tourism, Foodservice Admin., Dietetics

Virginia Polytechnic Institute and State University

Hotel, Restaurant, and Institutional Management

Dr. Michael D. Olsen
Dept. of Hotel, Restaurant and Institutional Management
Virginia Polytechnic Institute and State University
Hillcrest Hall
Blacksburg, VA 24061
703/231-5515

Program Enrollment: 350 undergraduate, 43 graduate
Degree Awarded: Bachelor of Science
Degree Category: Hotel, Restaurant, and Institutional Management

Washington State University

Hotel and Restaurant Administration

Dr. W. Terry Umbreit
Director
Hotel and Restaurant Administration
College of Business and Economics
Washington State University
Pullman, WA 99164
509/335-5766

Program Enrollment: 650
Degree Awarded: Bachelor of Arts
Emphasis/Specialization: Hotel and restaurant industry with emphasis on fast-service segment

Widener University

School of Hotel and Restaurant Management

Nicholas J. Hadgis
Dean
Widener University
School of Hotel and Restaurant Management
14th and Chestnut Streets
Chester, PA 19013
215/499-1101
Program Enrollment: 460
Degree Awarded: Bachelor of Science

SOURCE: A Guide to College Programs in Hospitality and Tourism, 1991-1992, The Council on Hotel, Restaurant and Institutional Education

MARKET SEGMENT REPORT

CHICKEN

The current trend is toward more nonfried products.

By Jacque Kochak

For a long time the chicken segment has been slow, steady, and not very glamorous. People tended to take chicken for granted, like an old friend. Now that old friend has gone out and returned with fashionable clothes, and shown up at the party with new pizzazz—and new friends.

"What people used to know as fried chicken and what they will know in five years may be very different," says Dick Cromwell of Cajun Joe's, an aggressively expanding chicken chain based in Boston. "People are doing it better, doing it fresher, doing it differently. Gone are the days when all you could get was Kentucky Fried."

A good deal of the public's renewed interest in fast-food chicken is undoubtedly because of changes at PepsiCo subsidiary Kentucky Fried Chicken, which controls 50% of the $6.4 billion U.S. chicken restaurant category. But some of the excitement has also been generated by the spate of new, vital upstarts with a different idea. Instead of traditional fried chicken, they serve marinated and often skinless chicken in grilled, broiled, and baked incarnations.

"Nonfried chicken is what's happening," says Jim Fields, vice president of development for Boston Chicken, another Boston organization with aggressive expansion plans.

In nearly every major city, young chains and independents with names like YaYa's or R.D. Clucker's are emerging. Interest in the chicken segment is so intense that John Y. Brown, formerly with Kentucky Fried Chicken, is reputedly drawing up plans for a company called Roaster's.

Grandy's Southwestern Grilled Chicken is served as a sandwich or as part of a dinner platter with a roll and vegetables.

DRAMATIC TURNAROUND. So what's going on? It's old news that chicken consumption has risen as beef consumption has declined, but the new twist is that both traffic counts and customer orders at chicken restaurants have shown a dramatic turnaround in the last two years.

Just two years ago, in 1989, CREST data published by Park Ridge, IL-based GDR/Crest, a consulting firm that tracks consumption patterns, showed that traffic in chicken fast-food opera-

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MARKET SEGMENT REPORT

CHICKEN

tions was down by 4% from the previous year. By 1990, that number had reversed itself, with traffic increasing 3.4% from 1989.

Chicken orders also increased. Chicken orders at chicken fast feeders were down 1.4% in 1989, then up 5.1% in 1990. At the same time, chicken orders in midscale and upscale restaurants continued to increase at a steady pace, as during the last several years.

With 5,000 restaurants and $3.2 billion in domestic sales, Louisville, KY-based Kentucky Fried Chicken has practically defined the segment for many years. Now, pressured by changing consumer demands, the lumbering giant is trying to slowly alter its course.

The company is in the process of rolling out its new Lite 'n Crispy chicken, which is still fried but without the fat-rich skin. The chicken contains 20% less fat than KFC's original recipe.

The goal is to move KFC from its positioning as a place to get fried chicken to a place to get chicken, period. That chicken might be fried, or it might be broiled or served in chicken salad. Part of the strategy is to move gradually away from the name Kentucky Fried Chicken and use only the initials KFC.

Whether the strategy will be successful remains to be seen. Any repositioning can be risky, but KFC is a healthy company with an already-strong customer base.

Competitors are now aiming at a specific niche. "Our customers are middle to upper-middle class women 25 to 45 years old. That's not KFC's market," notes Steven Wasserman, an executive officer with Woodbury, NY-based Pudgie's, which pioneered the sale of skinless chicken in 1981. "Skinless chicken isn't a magic equation. We know this is good for our market, but I'd hate to have to educate a whole new group of customers."

KFC's national rollout of Lite 'n Crispy began in February, and is expected to be completed by the end of the summer, says Richard Detwiler, KFC's director of public affairs.

In June, however, the rollout was temporarily halted as the company mulled over changes in the Lite 'n Crispy product. Detwiler attributed the halt to "fine-tuning," and said plans to have the chicken in all stores by the end of summer were still in effect.

One KFC franchisee says that the company had been using a frozen product and was investigating the use of fresh chicken because of competition.

At any rate, the new product introduction has been favorably received by franchisees, and customers seem to like the taste. "It's tough to measure this early, but as far as we can tell we're seeing people who haven't visited KFC recently," says Detwiler. "We're aiming Lite 'n Crispy at people who love chicken, but who haven't been to KFC in a while because of dietary concerns. But we don't market Lite 'n Crispy as a health food or a diet food; it is marketed as great-tasting fried chicken without the skin."

In test markets, KFC saw sales

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Boston Chicken specializes in rotisserie chicken with a variety of side dishes.

MARKET SEGMENT REPORT

CHICKEN

increases of 5% to 20% when Lite 'n Crispy was introduced, and those increases seem to be carried through during the roll-out, says Detwiler.

The introduction of Lite 'n Crispy chicken is only one of several new items on the KFC menu. Also new are a wide variety of snackable products, such as Hot Wings, Honey Barbecue Wings, and small chicken sandwiches.

PepsiCo bought KFC from RJR Nabisco Inc. in late 1986, and the Purchase, NY-based conglomerate has a reputation for prodding sleepy food-service giants. PepsiCo rejuvenated Pizza Hut, another somnolent giant, and now the focus is on KFC.

Virtually all of Chick-fil-A's units are located in malls.

KFC needed the stimulus. In the U.S., high chicken costs and tough competition squeezed KFC's sales and margins, and in 1989 domestic sales grew only 4.4%, while profits dropped.

By the fourth quarter of 1990, the company posted a worldwide earnings gain of 22% to $34.3 million, and sales advanced 14% to $478.5 million. This performance was driven by a 37% increase in domestic profits.

Besides rolling out new products, KFC has been cutting prices on its take-out boxes and buckets, imitating the successful low-price strategies adopted by sister companies Pizza Hut and Taco Bell.

CONSTERNATION. Such discounting is causing some consternation among competitors. "KFC has made everybody rethink chicken prices," notes Mario Palumbo, vice president of marketing for Lewisville, TX-based Grandy's. "They're making money because of volume, but it's hard to tell if other companies can compete."

In fact, the frenzy of discounting among all the fast-food chains has operators worried. "People are doing lots of business, but they can't make money," says one KFC franchisee. "Everybody's giving the stuff away."

Home delivery seems to be a potentially lucrative business for KFC. Some 100 units are now testing home delivery. Detwiler says the test looks promising because chicken is a product that retains heat very well and is prepared in bulk, so an order can be filled as soon as it comes in.

In addition, KFC offers the option of a full meal, with such side dishes as mashed potatoes and cole slaw. "You can't get that from Domino's or Pizza Hut," Detwiler notes.

MORE SPINACH NEEDED. The other major force in the chicken segment is Jefferson, LA-based Al Copeland Enterprises, which operates Popeye's Fried Chicken and Church's Fried Chicken. Al Copeland Enterprises is now embroiled in bankruptcy proceedings, after Popeye's acquired Church's in 1989. In mid-April, the company's lenders demanded accumulated debt of approximately $391 million that was taken on at the time of the acquisition.

Segment leader

KFC owns 50% of the market.

According to those familiar with the company, units are operating as usual and the average customer is not aware of the financial hurly-burly. Speculation abounds that the banks will bring in new management, and that the two chains will be unbundled, with one sold to raise capital. Then both chains will be competitive again.

"As long as they're in a state of turmoil, that's delightful," says one competitor. "They have a very good product, and they will be back."

As of December 1990, Popeye's was operating 786 restaurants with per store averages of $714,700 and systemwide sales of $514 million, according to spokeswoman Susan Hennessey.

Church's introduced the foot-long chicken sandwich, the country-style pork chop, and glazed apple pie. The company continued with the advertising theme "Big Pieces, Little Pieces," and supported its promotions by direct mail, radio, and television.

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MARKET SEGMENT REPORT

CHICKEN

At Popeye's, seasonal seafood promotions such as butterfly shrimp, a shrimp platter, and a shrimp po' boy continued through the spring in most markets. Conversion of units to a new '50s-style diner look continued, with a hot pink and turquoise color scheme, chrome and glass-block accents, and "Popeye's Chicken & Seafood" signage.

Also new for Popeye's is a relocatable building, dubbed Popeye's Express, which is totally portable and all-electric, and designed for remote or smaller markets.

SECOND TIER. Below KFC, Popeye's, and Church's, there is an enormous drop-off in terms of units and sales. Several medium-sized regional chains exist, such as Lee's Famous Recipe Chicken, Grandy's, Mrs. Winner's, Brown's Fried Chicken, and Bojangles.

One of the largest regional chains is Atlanta-based Chick-fil-A, which posted record sales of $293.7 million for 1990. That was an 11.3% increase over the chain's 1989 sales, and marked 23 consecutive years of sales growth for the company since it was founded. In fact, the company has experienced only two years of less than double-digit growth.

Chicken restaurant sales totaled $6.4 billion.

Chick-fil-A operates 445 restaurants in 31 states, with most units located in shopping malls.

Unlike the larger chicken chains, Chick-fil-A specializes in a boneless breast of chicken sandwich, a marinated, chargrilled chicken sandwich, and chicken nuggets. Also available are a barbecued chicken sandwich, a chicken salad sandwich, and chicken soup.

One of the newest menu items is a chargrilled chicken garden salad. Side dishes include tossed salad, carrot and raisin salad, cole slaw, potato salad and waffle potato fries. Desserts include lemon pie, brownies and cheesecake.

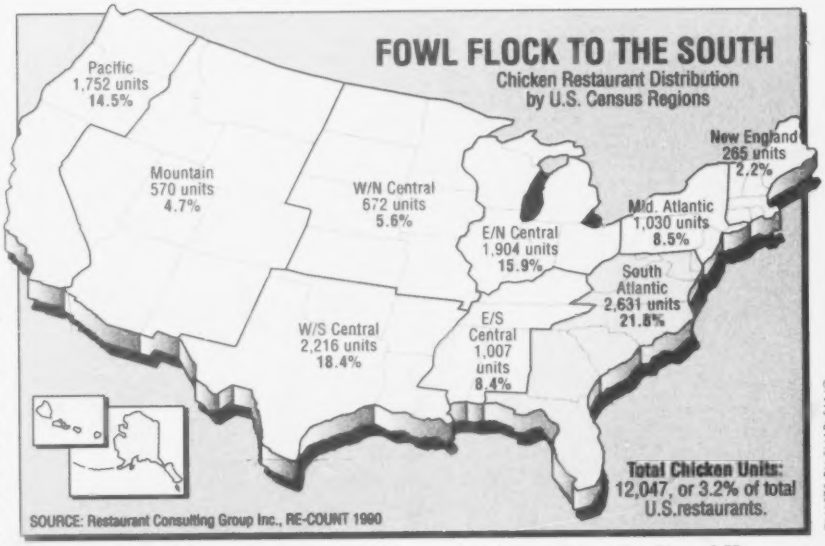

CHART BY SHARI FANG

In recent years the company has been developing free-standing units in mature markets. The investment is two to three times higher than for mall units, notes the company's executive vice president for operations Dan Cathy. But free-standing units also generate twice the sales, he says. "This is a major growth vehicle for us."

Chick-fil-A is also focusing attention on its Dwarf House concept, a full-service restaurant that offers hamburgers, rib-eye steaks and full breakfast service in addition to a chicken menu. The first Dwarf House, opened in 1946 by Truett Cathy, actually preceded Chick-fil-A. The tiny restaurant, with only six tables, gave birth to quick-service Chick-fil-A in 1967, and the youngster grew quickly.

Now, the Cathy family is experimenting with the Dwarf House, with four opened in the last few years and two more opening in 1991. One of those units is doing $3 million in annual volume, Cathy says. The Dwarf House is, however, very capital-intensive and requires a much larger investment than a Chick-fil-A. The menu is more complex, and restaurants offer take-out and drive-thru service in addition to dine-in.

"We're growing the Dwarf House at a very careful, controlled rate," says Cathy. "We'll open just a few a year. The units give us a lot of stability."

COMFORTABLE NICHE. Lee's Famous Recipe Chicken, based in Nashville, TN, is a subsidiary of Shoney's Inc. The chain is typical in that the company has found a comfortable niche and doesn't go head-to-head with its larger chicken competitors.

The company's 278 restaurants in 20 states serve a variety of chicken products as well as country-fried steak, chicken livers, a barbecued chicken sandwich, and biscuits made from scratch, along with nine vegetables and salads.

Hot 'n spicy chicken wings and chicken tenders were successfully introduced in late 1990. Lee's recently launched a skinless chicken product.

Lee's has been updating its image with a farmhouse design, with increased seating capacity and space for labor efficiencies in kitchen and counter areas. The company is showing impressive same-store sales growth; average unit sales of company-owned units have continued to increase, from $442,000 in

continued on page 156

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MARKET SEGMENT REPORT

CHICKEN

Specializing in chicken, Zehnder's has annual sales of $12.6 million.

1983 to $603,000 in 1990.

Lee's 1991 plans called for opening an additional 17 units in 1991, with 15 of those franchised.

In August 1990, Charlotte, NC-based Bojangles was purchased from Horn & Hardart by Dick Campbell, formerly vice president and general manager for a 650-unit division of KFC. His investment partners are Interwest Partners of Palo Alto, CA, and Sienna Holdings of Los Angeles.

The past year has been spent fine tuning operations and sprucing up units, with over $1 million spent on remodeling so far, says Campbell. Results are already apparent. Unit volumes that were averaging $810,000 have soared to $1 million, with individual units showing sales increases of 20% to 30% over last year.

Health concerns are driving menu changes.

Bojangles introduced skinless fried chicken in early March with "spectacular" results. The skinless chicken uses the same marinade and breading as its spicy Cajun product. The company also introduced Chicken Supremes, a finger food made from chicken breast, marinated and breaded. The new product already accounts for 8% of sales. A Rajun Cajun sandwich and salads are under development. A value menu, with seven biscuit sandwiches at 98¢ each, has been introduced at breakfast.

Plans call for building 100 new units in the next five years, mostly within 150 miles of headquarters. The company now operates 154 units with systemwide sales for fiscal 1991 estimated at $130 million.

Irvine, CA-based El Pollo Loco, a division of Denny's Inc., is different from the larger chicken chains because its marinated chicken is flame-broiled, not fried. The 215-unit chain, with units primarily on the West Coast, has been positioned as a healthy alternative since its founding some 10 years ago.

MEXICAN STYLE. El Pollo Loco's chicken . Mexican-style; it is marinated for 24 hours in fruit juice, charbroiled, and cut to order in the customer's view. The chicken is served with a tomato salsa and a choice of flour or corn tortillas. Additional side dishes include Spanish rice, pinto beans, and cole slaw.

El Pollo Loco has introduced tacos and burritos, made with the same chicken served in stores, says Norm McKinnon, the company's director of marketing. The two new products are portable, and McKinnon says the drive-thru sales have increased considerably as a result of the introductions.

Also new is "The Really Big Thing,"

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MARKET SEGMENT REPORT

CHICKEN

a picnic in a bag for six to 12 people. Up to 24 pieces of chicken are accompanied by tortillas, salsa, three to six side dishes, plates, and service ware.

El Pollo Loco, with an average unit volume of $900,000 and systemwide sales of some $180 million, expanded rapidly during the 1980s, but that pace will slow as the company focuses on strengthening operations and maintaining consistency.

Grandy's Country Cookin', with 104 units and 1991 systemwide sales of $180 million, is differentiating itself even more from other fast-food chicken operators by putting emphasis on service, including in the dining room.

Grandy's point of difference from its competitors is that some 65% of business is dine-in, unlike most chicken operations that emphasize take-out. The company has added labor hours and beefed up its force of "Grannies," dining-room hostesses who serve free drink refills and complimentary dinner rolls.

In addition to chicken, Grandy's serves homemade cinnamon rolls, chicken-fried steak, salads, and breakfast. The company has switched to all-vegetable oil for frying, and has introduced Southwestern grilled chicken dinners and sandwiches as a nonfried alternative. The grilled chicken represents anywhere from 10% to 12% of sales in markets where introduced, and at least half of that is incremental, says Palumbo.

Grandy's has also rolled out chicken-fried chicken, a battered, boneless breast fillet served with gravy and mashed potatoes.

In the company's flagship Ft. Worth market, 42 company-owned units have been remodeled with new red and green neon signage. Interiors have been redesigned with a more contemporary country decor.

THE NEW CONTENDERS. Several young, vigorous chains have been gaining a lot of attention lately. Perhaps the most aggressive expansion plans in the chicken segment today are being touted by Boston Chicken, which specializes in a rotisserie-broiled chicken served with mashed potatoes and fresh vegetables.

The first Boston Chicken unit opened in 1985 in a 900-sq.-ft. Newton, MA, storefront. Two entrepreneurs, Arthur Cores and Kip Kolow, knew little about market research or the latest trends. They just decided to serve simple, homestyle food and hope for the best.

As luck would have it, former KFC franchisee George Naddaff stopped by Boston Chicken to pick up some food at his wife's request. His curiosity was piqued by the line of eager customers. He loved the chicken, and his wife was happy because she had "guilt-free" fast food for the kids. So, after a number of visits, he approached the owners and suggested that he build Boston Chicken into a national company.

Naddaff's experience in owning and operating 28 KFCs, coupled with other successful franchising business ventures gave him credibility. His offer was accepted.

The first step was to open two company stores, one in Cambridge and one in Brookline, MA. There, recipes were fine-tuned and standardized and training manuals were written. Then Naddaff hired Charlie Cocotas, formerly president of Church's Fried Chicken and International Dairy Queen's Golden Skillet Fried Chicken, who further refined operations.

Also brought on board as senior vice president was Ralph Guerino, formerly president of the Papa Gino's chicken chain. Bob Wollaston, former executive vice president of Al Copeland Enterprises and management director and CEO of KFC in Great Britain, came on as a senior vice president and general manager of the southeast region.

AMBITIOUS PLANS. The result has been impressive growth. A year ago Boston Chicken operated only four units; today, that total has reached 26. Managment has ambitious plans for the future.

"Obviously, this was not an organization built to run, operate and oversee the number of units we have now," notes Fields. At press time, another four units were under construction, eight were scheduled to begin construction, and financial and contractual agreements were finalized for an additional 90 franchises.

"We expect to have a total of 197 corporate stores and 660 franchised stores by the end of 1996," says Fields.

Total cost for a franchisee to open a Boston Chicken is $325,000 to $350,000. Most are storefront operations of 2,000 to 2,500 sq. ft., which open faster than free-standing stores. Franchised stores are averaging over $859,000 on an annualized basis, says Fields.

The stores seat from 40 to 65. Delivery is being tested.

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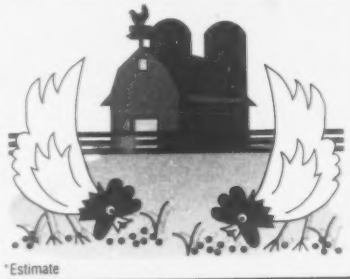
Fast-food chicken orders were up 5.1% in 1990.

TOP CHICKEN CHAINS

	U.S. System Sales	U.S. System Units
KFC	$3.2 bil.*	5,000
Popeyes	$547 mil.	786
Church's	$514 mil.	1,163
Chick-fil-A	$294 mil.	445
El Pollo Loco	$180 mil.	215
Grandy's	$180 mil.	104
Lee's Famous Recipe	$144 mil.	278



*Estimate

MARKET SEGMENT REPORT

CHICKEN

Prices are low; the customer can purchase a quarter chicken with any two side dishes and corn bread for as low as $3.95 for a leg and a thigh. A half chicken with side dishes is $5.25.

The attraction is chicken marinated for 24 hours, then slow roasted on a vertical rotisserie. If the chicken is not sold in one hour, it is set aside, boned, and used in pot pies and chicken salads. Accompaniments range from mashed potatoes to butternut squash with brown sugar and zucchini sauté.

RAGIN' CAJUN. Also very aggressive is another Boston-based chain, Cajun Joe's. The chain has joined forces with Milford, CT-based Subway Sandwich Shops to take the company nationwide.

Fast-food chicken traffic counts increased 5.4%.

The first Cajun Joe's opened in 1985, and 150 units are now open in 31 states. Plans call for operating 250 units by the end of the year, with emphasis on filling in markets where Cajun Joe's is already located in order to build name awareness.

Cajun Joe's offers a spicy fried chicken as well as a roasted chicken, chicken tenders, corn muffins, biscuits, rice and gumbo. Prices are low, with individual pieces selling for less than $1, and a lunchbox with two pieces of chicken, a side order, and a muffin for around $3.

Like Subway, the majority of Cajun Joe's operate in small, 1,000- to 1,500-sq.-ft. locations in strip centers. Also like Subway, the cost to open a unit is a modest $100,000.

According to Dick Cromwell, Cajun Joe's co-president, unit volumes vary greatly. "We have a lot of stores open a very short amount of time, and some are doing better than others," he says. "At this point, our name awareness is very small."

Also on the East Coast is Pudgie's, which was founded in 1981 by George Sanders. In 1989 Sanders began franchising, and now 85 units operate from Florida to Connecticut. "We're looking to fill up the United States," says executive officer Steven Wasserman, who left his job as a franchising attorney representing Pudgie's to join the company. "But we're trying to grow at an even keel," he adds. "We have no debt, we're privately held, we don't borrow, and we live on our royalties. There's no financial pressure to expand unwisely."

At this point, Wasserman says, Pudgie's favors owner/operator franchisees, not area developers.

At $11, Pudgie's has a higher average check than many chicken restaurants, and a diverse menu that includes rice, corn, boiled ribs, a chicken sandwich, mushrooms, onion rings, mozzarella strips, shrimp, and clams, in addition to fried and baked skinless chicken. Everything is cooked to order.

Stores usually go into strip centers, requiring only about 1,200 sq. ft. Some 40% of sales come from delivery, and another 40% from take-out. "This is a very efficient operation geared for the '90s," says Wasserman. "Franchisees can get in for $170,000, and some stores gross a million dollars a year."

On the West Coast, the young Koo Koo Roo organization is drawing attention. Eleven units are now open, seven

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Woodbury, NY-based Pudgie's claims to have pioneered skinless fried chicken.

MARKET SEGMENT REPORT

CHICKEN

of them company-owned. Four more units are about to open, the biggest in the Taj Mahal in Atlantic City.

Seven of the units are in Southern California, one in Las Vegas, two in South Florida and one in New York City.

IT WON'T KILL YOU. Koo Koo Roo's attraction is "fast food that's not going to kill you," says Russell Ruscigno, vice president of the Los Angeles-based chain. "The baby boomers are maturing, but they're hooked on the convenience and price point of fast food."

Koo Koo Roo's founder, Mike Badalian, is a veteran of white tablecloth restaurants, and he spent six years planning a full-service restaurant in a fast-food setting, says Ruscigno. The result is a menu featuring skinless, flame-broiled chicken that is marinated in vegetable juices and spices. Side dishes include cucumber salad and Middle Eastern flat bread.

All units are located in strip centers and storefronts and seat about 50 people. Typically, however, 65% of sales are to go, says Ruscigno. Price range is $4 to $17 for a 12-piece combo, and average check is $6.50.

Koo Koo Roo stores don't have freezers or microwaves because everything is prepared fresh. "Our biggest concern was figuring out how to do this kind of

Marinated, grilled chicken is now a major subsegment.

menu with minimum-wage employees. But we have found that because employees are actually creating a product they are very enthusiastic," says Ruscigno. "We have very little turnover."

Management is ambitious about expanding the Koo Koo Roo concept. "We hope to have a total of about 30 units by the end of this year," says Ruscigno. "By next year? The world!"

Lite 'n Crispy is KFC's new skinless fried chicken product.

TRADITON. Despite all the interest in new ways to serve chicken, there's still a giant market for traditional country fried chicken. Witness the success of Zehnder's in Frankenmuth, MI, a town of about 4,000 located about 20 minutes from Saginaw. The restaurant is operated by Eddie and Marian Zehnder and is located in a circa-1856 hotel.

The restaurant seats 1,300 in 10 dining rooms, uses about 350,000 chickens a year, and serves a million customers annually. Zehnder's annual sales of $12.6. million make it the seventh largest independent restaurant in the country.

That is amazing enough, but consider this: Right across the street is the Frankenmuth Bavarian Inn, run by another Zehnder, serving the identical menu, and ranked as the ninth largest independent restaurant.

The two restaurants draw customers from Ohio, Indiana, and Illinois to the area known as "Michigan's Little Bavaria," and are considered to be a major tourist attraction.

The menu, served family style, features homemade noodle soup, cabbage salad, cheese spread with garlic toast, chicken liver pâté, white bread and raisin and fruit bread, fruit preserves, cottage cheese, seasonal relishes, fried chicken, dressing, mashed potatoes, gravy, garden vegetables, and ice cream or sherbet. The all-you-can-eat dinner is only $11.50 per person.

Although at Zehnder's fried chicken is king, the family is not unaware of growing concerns about healthy eating. Only soybean oil is used for frying the large, parboiled chickens.

All in all, the chicken segment seems to be quite vital, with new ideas aplenty. The public's nutritional concerns will continue to fuel interest in chicken.

"Issues of nutrition and health are certainly not a fad," says Chick-fil-A's Cathy. "The concerns are very real, and not just for Yuppies. Older people are concerned, too." **RB**